

# Plan Your Telehealth Workflow

A tip sheet for making telehealth part of your practice

## STEP 1: Plan Your Telehealth Program



Consider all of your options before launching your telehealth services:

- ▶ Consider your community's ability to access reliable internet service
- ▶ Pick a telehealth platform that meets the needs of your patients and your practice
- ▶ Plan to accommodate telehealth appointments in scheduling, staffing, billing, privacy, and data security.

## STEP 2: Create an Accessibility Plan



Make sure you can offer telehealth services to all of your patients:

- ▶ Patients with hearing loss
- ▶ Patients with vision loss
- ▶ Patients in behavioral health crisis
- ▶ Patients with limited English proficiency
- ▶ Patients with mobility issues
- ▶ Caregivers supporting patients

## STEP 3: Prepare for Telehealth Visits



A seamless transition to telehealth will benefit your patients, your staff, and your practice:

- ▶ Make sure your staff is trained and feels comfortable using telehealth
- ▶ Post clear instructions for scheduling telehealth appointments
- ▶ Give your patients clear instructions on how to join their telehealth appointment
- ▶ Consider having a medical assistant or digital navigator meet with your patient prior to the appointment to address any access issues.
- ▶ Create a plan for a bad or lost internet connection and share that plan with your patients
- ▶ Hold a practice telehealth appointment with a staff member or co-worker before seeing patients to make sure everything works seamlessly

## STEP 4: Conduct Telehealth Visits



Feeling comfortable with telehealth leads to more convenient health care:

- ▶ Identify yourself to new patients and confirm their identity
- ▶ Verify at the start of each call that the patient's internet connection is working
- ▶ Make sure the patient has the privacy they need to speak freely
- ▶ Create an emergency plan in case your patient is in crisis
- ▶ Use friendly body language and eye contact to make the appointment feel like an in-person visit

## STEP 5: Follow Up After a Telehealth Visit



Grow the success of your telehealth program with patient feedback and follow through:

- ▶ Document the patient visit and note that it was a telehealth appointment
- ▶ Follow through with any needed lab orders, prescriptions, or follow-up appointments
- ▶ Consider asking your patients how your team could improve their telehealth experience

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